

1 Haydee Kane (CONS/PE)**Case No. 0467144****Attorney Kruthers, Heather H (for Public Guardian)****Probate Status Hearing Re: Filing of the Thirteenth Account**

Age: 63	PUBLIC GUARDIAN , was appointed Conservator of the Person and Estate, on 10/30/1992. Letters issued on 11/03/1992.	NEEDS/PROBLEMS/COMMENTS: 1. Need Thirteenth Account.
Cont. from	Order Settling Twelfth Account filed 11/05/2014.	
Aff.Sub.Wit.		
Verified	Minute Order of 11/05/2014 set this states hearing for the filing of the Thirteenth Account.	
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Status Report filed 10/28/2015 states Currently the Public Guardian is short staffed, because one of the support staff suddenly retired for medical reasons. The person who prepares the necessary documents for the accounts is currently covering both her duties and the duties of the other staff member who retired. She is also training the replacement for another staff member, which further consumes her available time. Therefore, she is unable to get all the accounts done that need to be done before the scheduled status hearing.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202	Therefore, it is respectfully requested that the next status hearing for this matter be set no sooner than 90 days from the date of this status hearing. It is further requested that this matter be continued without the appearance of counsel.	
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		

Reviewed by: LV
Reviewed on: 11/03/2015
Updates:
Recommendation:
File 1 – Kane

2 Manuel C Rodriguez (Estate) Case No. 05CEPR01418**Attorney Mortimer, Steven R (for Rogue Rodriguez – Administrator)****Probate Status Hearing Re: Filing First Account/Petition for Final Distribution**

	ROQUE RODRIGUEZ , son, appointed administrator with full IAEA authority with bond set at \$22,500.00 on 03/07/2006.	NEEDS/PROBLEMS/COMMENTS: 1. Need First Account/and or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
	Letters issued on 03/16/2006.	
Cont. from	Inventory and Appraisal filed 03/16/2006 shows an estate valued at \$22,500.00 consisting of real property.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Order Confirming Sale of Real Property filed 08/06/2015.	
Aff.Mail	Minute Order of 08/06/2015 set this Status Hearing for the filing of the First Account/Petition for Final Distribution.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 11/03/2015
		Updates:
		Recommendation:
		File 2 – Rodriguez

Second and Final Account and Report of Victoria Pumarejo, Executor, and Petition for Allowance of Statutory Fees to Attorney for Executor and for Final Distribution

DOD: 8/24/2008		VICTORIA PUMAREJO , Executor, is petitioner.		NEEDS/PROBLEMS/COMMENTS:	
		Account period: 8/24/08 – 9/29/15		1. Petition was not verified. Probate Code §1021.	
Cont. from		Accounting - \$51,387.99		2. Petition states the account period is from the date of death through 9/29/15. This second account should begin at the end of the first account (Although it appears that this account does just cover the period from the last account 2/28/15 to 9/29/15).	
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH - \$51,337.59		3. Summary of Account does not balance. The charges must equal the credits. (It appears that the attorney didn't list the amounts correctly, however the account itself does balance.)	
<input type="checkbox"/>	Verified	<input checked="" type="checkbox"/>	Ending POH - \$51,187.99	4. Petition does not contain a statement regarding Probate Code §216 and 9202(b) re: notice to the Director of Victims Compensation and Government Claims Board.	
<input checked="" type="checkbox"/>	Inventory	Executor - waives		5. Petition does not contain a statement regarding Probate Code §216 and 9202(a) re: notice to the Director of Health Care Services.	
<input checked="" type="checkbox"/>	PTC	Attorney (statutory) - \$3,168.00		6. Attorney costs includes reimbursement for postage in the amount of \$11.27. Local rule 7.17 states postage is considered to be a normal cost of doing business and is therefore not a reimbursable cost.	
<input checked="" type="checkbox"/>	Not.Cred.	Attorney costs - \$906.77 (filing fees, certified copies, postage)			
<input checked="" type="checkbox"/>	Notice of Hrg	Closing - \$500.00			
<input checked="" type="checkbox"/>	Aff.Mail	<input type="checkbox"/>			
<input type="checkbox"/>	Aff.Pub.				
<input type="checkbox"/>	Sp.Ntc.				
<input type="checkbox"/>	Pers.Serv.				
<input type="checkbox"/>	Conf. Screen				
<input checked="" type="checkbox"/>	Letters	<input type="checkbox"/>	9/7/10		
<input type="checkbox"/>	Duties/Supp				
<input type="checkbox"/>	Objections				
<input type="checkbox"/>	Video Receipt				
<input type="checkbox"/>	CI Report				
<input type="checkbox"/>	9202	<input checked="" type="checkbox"/>			
<input checked="" type="checkbox"/>	Order				
<input type="checkbox"/>	Aff. Posting				
<input type="checkbox"/>	Status Rpt				
<input type="checkbox"/>	UCCJEA				
<input type="checkbox"/>	Citation				
<input checked="" type="checkbox"/>	FTB Notice				

Age: 7		<p>ANDREW HILL, father, is Petitioner.</p> <p>DONAVAN MORRISON and PRISCILLA MORRISON, maternal grandparents, were appointed as Co-Guardians on 07/12/11. – <i>Consent of both guardians filed 05/21/15.</i></p> <p>Mother: STEPHANIE MORRISON – <i>personally served on 09/22/15</i></p> <p>Paternal grandfather: FRANCIS GILBO Paternal grandmother: HALLIDIE HILL – <i>personally served on 09/17/15</i></p> <p>Petitioner states [see file for details].</p> <p>Court Investigator Jennifer Young filed a report on 07/14/15.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 10/08/15</u> Minute order from 10/08/15 states: Mr. Hill represents that the paternal grandparents are Hallidie Hill and Francis Gilbo. Late-filed notices show service of the mother and the paternal grandmother; the Examiner is to review the documents forthwith and let Mr. Hill know if there are any problems with them. Mr. Hill is to have Francis Gilbo properly noticed. The Court is prepared to grant the petition upon proper service</p> <p>1. Need proof of service by mail at least 15 days before the hearing of <u>Notice of Hearing</u> <u>or</u> <u>Consent & Waiver of Notice</u> <u>or</u> <u>Declaration of Due Diligence</u> for:</p> <p>a. Francis Gilbo (paternal grandfather)</p>
Cont. from 072115, 090115, 100815			
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
Aff.Mail	x		
Aff.Pub.			
Sp.Ntc.			
✓ Pers.Serv.	w/		
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		Reviewed by: JF	
		Reviewed on: 11/02/15	
		Updates:	
		Recommendation:	
		File 4 – Morrison	

5A Nathaniel Collins & Malichi Collins (GUARD/P) Case No. 12CEPR00561

Petitioner Collins, Angelina Denise (pro per – mother)

Attorney Walters, Jennifer (for Lana Pratt – maternal grandmother/Guardian)

Petition Visitation

Nathaniel, 5		ANGELINA D. COLLINS , mother, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: CONTINUED FROM 10/05/15 1. Proof of service filed 10/27/15 indicates that Notice was mailed to the Guardian and maternal grandfather on 10/27/15 (only 9 days before the hearing). Probate code § 1460 requires 15 days' notice. 2. Need proof of service by mail at least 15 days before the hearing of <u>Notice of Hearing or Consent & Waiver of Notice</u> for: a. Nathaniel Comenger (father) b. Paternal grandparents Note: Declaration of Due Diligence filed 10/27/15 states that Petitioner only has a contact number for a paternal aunt who stated that the father is "on the run" and that she and the paternal grandmother want nothing to do with the situation.
Malichi, 4			
		LANA PRATT , maternal grandmother, was appointed Guardian on 11/26/12. – Served by mail on 10/27/15 (9 days' notice)	
Cont. from 080415, 082415, 100515		Father: NATHANIEL COMENGER – Declaration of Due Diligence filed 10/27/15	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Paternal grandfather: NOT LISTED – Declaration of Due Diligence filed 10/27/15	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Paternal grandmother: NOT LISTED – Declaration of Due Diligence filed 10/27/15	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Maternal grandfather: KURT RICARDO – served by mail on 10/27/15 (9 days' notice)	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.	Petitioner states [see file for details].	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	x	Reviewed by: JF Reviewed on: 11/02/15 Updates: Recommendation: File 5A – Collins
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

5A

Petitioner Collins, Angelina (pro per – mother/Petitioner)

Petition – Terminate Guardianship

Nathaniel, 5	ANGELINA D. COLLINS, mother, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 10/05/15</u> 3. Proof of service filed 10/27/15 indicates that Notice was mailed to the Guardian and maternal grandfather on 10/27/15 (only 9 days before the hearing). Probate code § 1460 requires 15 days' notice. 4. Need proof of service by mail at least 15 days before the hearing of <u>Notice of Hearing or Consent & Waiver of Notice</u> for: c. Nathaniel Comenger (father) d. Paternal grandparents Note: Declaration of Due Diligence filed 10/27/15 states that Petitioner only has a contact number for a paternal aunt who stated that the father is "on the run" and that she and the paternal grandmother want nothing to do with the situation.
Malichi, 4	LANA PRATT, maternal grandmother, was appointed Guardian on 11/26/12. – Served by mail on 10/27/15 (9 days' notice)		
	Father: NATHANIEL COMENGER – Declaration of Due Diligence filed 10/27/15		
Cont. from 082415, 100515	Paternal grandfather: NOT LISTED – Declaration of Due Diligence filed 10/27/15		
Aff.Sub.Wit.	Paternal grandmother: NOT LISTED – Declaration of Due Diligence filed 10/27/15		
✓ Verified	Maternal grandfather: KURT RICARDO – Served by mail on 10/27/15 (9 days' notice)		
Inventory	Petitioner states [see Petition for details].		
PTC	Court Investigator Dina Calvillo filed a report on 10/01/15.		
Not.Cred.	Kern County Court Investigator Mario Correa filed a report on 10/08/15.		
✓ Notice of Hrg	Declaration of Petitioner, Angelina D. Collins, filed 10/26/15 states: [see file for details].		
✓ Aff.Mail	w/o		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Reviewed by: JF
Reviewed on: 11/02/15
Updates:
Recommendation:
File 5B – Collins

Attorney Boyajian, Thomas M. (for Conservator Irene V. Santos)

Final Account and Report of Conservator and Petition for Its Settlement, for Approval of Sale of Depreciating Property, for Allowance of Conservator's and Attorney's Compensation, and for Discharge of Conservator and Exoneration of Bond

DOD: 12/8/2014		IRENE V. SANTOS , daughter and Conservator of the Person and Estate, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 7/1/2014 - 8/1/2015	1. This accounting was not completed on the mandatory-use Judicial Council forms as required by Probate Code § 2620(a). CA Rule of Court 7.101 (a) provides if the Judicial Council has adopted a mandatory form, that form must be used. Need amended accounting on the mandatory-use Judicial Council forms.
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.	Accounting - \$54,999.39	2. <i>Schedule A, Receipts</i> , does not but should show the \$1,800.00 sale proceeds from the sale of Conservatee's 2004 Chevrolet (valued at \$4,500.00 on the <i>Final Inventory and Appraisal</i> filed 3/7/2013.) Need explanation for the disposition of the sale proceeds and an amended schedule and/or account.
<input checked="" type="checkbox"/>	Verified	Beginning POH - \$47,101.81	
		Ending POH - \$ 2,677.87 (all cash)	3. Based upon the cash on hand as stated in the account, the request for Conservator commissions and attorney fees exceeds the available funds by \$2.13 . Further, the conservatorship estate appears to have \$1,800.00 in funds that are not accounted for in the schedules.
	Inventory	Conservator - \$1,030.00 (services not itemized; Mileage Report itemization attached as Exhibit B totals \$118.69 for 206.42 miles @ \$0.575 per mile;)	
	PTC		4. Need proposed order pursuant to Local Rule 7.1.1 (F).
	Not.Cred.		
	Notice of Hrg	N/A	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	Attorney - \$1,650.00 (per Declaration attached as Exhibit A1 and A2; less than total of \$3,250.00 for 13.00 hours @ \$250.00 per hour, from 7/11/2014 to 1/23/2015;)	
	Conf. Screen		
	Letters	Bond - \$35,000.00	
	Duties/Supp	Petitioner prays for an order:	
	Objections	1. Approving and settling the Final Account and Report;	
	Video Receipt	2. Approving all acts and transactions of the Conservator relating to the conservatorship as shown in the account;	
	CI Report	3. Approving and confirming the sale of Conservatee's automobile as a sale of depreciating property;	
<input checked="" type="checkbox"/>	2620	4. Authorizing and directing Conservator to pay herself \$1,030.00 as compensation for her services rendered during the period of account; and	
	Order	5. Authorizing directing Conservator to pay the Attorney fees of \$1,650.00 as compensation for services rendered.	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Status Hearing Re: Filing of the First Account or Petition for Final Distribution

DOD: 1/9/14		EARLEEN M. LESHER , Sister, was appointed Executor with Full IAEA without bond and Letters issued on 3/20/14.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 052215		At the hearing on 3/20/14, the Court set this status hearing re: Filing of the First Account or Petition for Final Distribution.	<u>OFF CALENDAR</u>
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Inventory and Appraisal filed 9/23/14 reflects a total estate value of \$3,660,626.66 consisting for the most part of various real property.	First Account filed 11/4/15 is set for hearing on 1/6/16.
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC	Report of Status of Administration filed 5/7/15 states the estate is not in a condition to close at this time because the estate lacks sufficient funds to pay administration expenses. The City of Fresno is negotiating with the estate for the acquisition of permanent and temporary construction easements for the construction of an underground pipeline to be located on the estate's property in Fresno County. It is anticipated that these negotiations will be completed within the next six months and the sale of the easement rights will generate enough cash to pay administration expenses. Petitioner requests that the time for administering the estate be extended for one year.	Continued from 5/22/15
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	1. Need First Account or Petition for Final Distribution or written status report pursuant to Local Rule 7.5.	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed by: skc
			Reviewed on: 11/2/15
			Updates: 11/4/15
			Recommendation:
			File 7 - Leshner

First Amended Petition for Final Distribution on Waiver of Accounting

DOD: 12/7/2013		THOMAS BRESSLER , Executor, is petitioner.		NEEDS/PROBLEMS/COMMENTS:			
		Accounting is waived.					
Cont. from				1. Petitioner indicates he made preliminary distributions of the 1,858 shares of PG&E common stock, the proceeds from the sale of real property and the personal property to the beneficiaries. The petitioner made said distributions with a court order.			
<input type="checkbox"/>	Aff.Sub.Wit.	I & A	- \$206,733.74				
<input checked="" type="checkbox"/>	Verified	POH	- \$ 20,000.00 (real property)	2. Need receipts from the beneficiaries for preliminary distributions of the PG&E common stock, cash of \$34,343.69 and personal property from Sally Bressler and Derek Weibel.			
<input checked="" type="checkbox"/>	Inventory	Executor	- waives.				
<input checked="" type="checkbox"/>	PTC	Distribution, pursuant to Decedent's Will, is to:					
<input checked="" type="checkbox"/>	Not.Cred.						
<input checked="" type="checkbox"/>	Notice of Hrg	W/					
<input checked="" type="checkbox"/>	Aff.Mail						
<input type="checkbox"/>	Aff.Pub.						
<input type="checkbox"/>	Sp.Ntc.	Thomas Bressler				- 1/3 interest in real property	
<input type="checkbox"/>	Pers.Serv.	Sally Bressler				- 1/3 interest in real property	
<input type="checkbox"/>	Conf. Screen	Derek Weibel				- 1/3 interest in real property	
<input checked="" type="checkbox"/>	Letters	6/3/14					
<input type="checkbox"/>	Duties/Supp						
<input type="checkbox"/>	Objections						
<input type="checkbox"/>	Video Receipt					Reviewed by: KT Reviewed on: 11/2/15 Updates: Recommendation: File 8 – Bressler	
<input type="checkbox"/>	CI Report						
<input checked="" type="checkbox"/>	9202						
<input checked="" type="checkbox"/>	Order						
<input type="checkbox"/>	Aff. Posting						
<input type="checkbox"/>	Status Rpt						
<input type="checkbox"/>	UCCJEA						
<input type="checkbox"/>	Citation						
<input checked="" type="checkbox"/>	FTB Notice						

DOD: 5-29-12		LORI SHIBATA , Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Page A is Trustee Lori Shibata's Petition for Instructions. Page B is Trustee Lori Shibata's First Account. Minute Order 10/1/15: Mr. Rube represents that a tentative settlement has been reached. Mr. Rube will be preparing a formal agreement and mutual release contingent upon Mr. Knudson's client inspecting the home. Note: On 7/9/15, the Court deferred its decision as to Ms. Lee's filing fees (for objections to both petitions) until it is determined if Ms. Lee is entitled to any compensation from the underlying action. Attorney Rube's status report filed 9/9/15 states: The trustee provided the documents requested by Mr. Knudson. The Wells Fargo checking acct has a balance of \$3,204.51 and savings has a balance of \$1,303.24. There are no other liquid assets in the trust. The estimated cost to repair the residence is approx. \$14,000 (estimate attached). The parties, by and through counsel only, have met in order to try to resolve the matter. Petitioner has offered to deed the subject real property over to respondent and terminate the trust. Petitioner does not want to try this case as there is no money to litigate further. If respondent is unwilling to accept the house "as is" and terminate the trust then Petitioner is willing to submit on the verified petition, objections, account, etc., for the court's decision. 1. Petitioner requests costs. The Court may require clarification or itemization. 2. Need order.
Cont from 111314, 031815, 041615, 052115, 070915, 091015, 100115		Petitioner states: Michael A. Lee established the Michael A. Lee Declaration of Trust dated 5-27-11 and was the initial trustee until his death on 5-29-12. The Trust is now irrevocable. The sole remainder beneficiary of the trust is Alyssa Lee, who is currently 20 years old. The trust provides that all remaining assets of the trust are to be held in trust for the benefits of Alyssa Lee, with income to be used for her support, including educational, medical, dental, hospital, and nursing expenses. One half of the trust's assets are to be distributed to Ms. Lee at age 30, free of trust, and the other half are to be distributed to Ms. Lee, free of trust, at age 35. Petitioner states the only assets of the trust are a Wells Fargo checking account containing approx. \$18,000.00 and residential real property in Fresno appraised at \$140,000.00. The trust's only income is the interest earned on the checking account, which is negligible at best. The residential real property is vacant and in very poor condition and cannot be rented until deferred maintenance is done and substantial repairs are made. Monthly expenses including utilities and gardening amount to approx. \$165 per month or \$1,980 per annum. Property taxes for 2013 amounted to \$1,502.28 annually or approx. \$125 per month. Expenses to provide for the care of Ms. Lee in compliance with the trust consist of the payment of her health insurance premiums of \$281 per month or \$3,372 per year. On 3-5-13, Robyn L. Esraelian, attorney for Petitioner, sent a Notice of Proposed Action Pursuant to Probate Code §16500 to Ms. Lee informing her of Petitioner's proposed action to list the property for sale. However, Ms. Lee objected in writing to the sale. SEE ADDITIONAL PAGES	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input checked="" type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order	x	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
Reviewed by: skc Reviewed on: 11/2/15 Updates: Recommendation: File 9A – Lee			

Page 2

Petitioner states the trust does not contain enough liquid assets to pay the maintenance and repairs on the home to make it habitable and income-producing, to pay current trustee's fees, and to meet the monthly obligations associated with the residence and the beneficiary. If repairs are made, the residence could probably only be rented for no more than \$950/month, which would not generate enough income to pay the monthly expenses as outlined above and ongoing costs of administration such as property management fees and trustee's fees, and would certainly not generate enough income to fulfill the intent of the Trustor.

Petitioner states selling the subject residence and investing the net sales proceeds would generate sufficient principal and income to fulfill the intent of the Trustor to provide for Ms. Lee as set forth in Article Five, Paragraph C of the Trust.

Petitioner prays for an order:

- 1. Directing her, as Successor Trustee of the Michael A. Lee Declaration of Trust, to sell the residential real property located at 773 E. Ellery in Fresno, CA;**
- 2. For costs herein; and**
- 3. For such other orders as the Court may deem proper.**

Beneficiary Alyssa Lee filed an Objection on 12-12-14. Ms Lee states she is aware of the condition of the residence and cost to maintain it, and has proposed that she or a family member be allowed to live there at a fair rental value. Respondent believes rent of \$1100/month, offset by utilities and gardening, would result in a net rental income to the trust of \$800-900, which would generate income for payment of taxes and insurance. Respondent believes that at a reasonable rental, a tenant would be responsible for gardening and property maintenance and would pay their own utilities, eliminating those expenses for the trust. Respondent also believes the sum of \$151,000 is less than fair market value, even considering the necessary repairs. Zillow.com shows the current value at \$185,000.

The residence was Respondent's father's residence and is a very meaningful property to her. She has offered to handle repairs, maintenance and upkeep, through rental, but the trustee continues to refuse to consider the beneficiary's wishes and/or cooperate with her in maintaining the residence. See email communications.

The actions of the trustee in failing to consider the wishes of the beneficiary and adopting an authoritarian and imperious attitude raise the issue of whether the trustee is in violation of the "Duty of Loyalty" Probate Code §16002(a) which requires that a trust be administered solely in the interest of the beneficiaries.

Respondent states sale of the residence resulting in proceeds to be invested over time exposes the trust to market risk. Respondent doesn't believe that a sale would further the interests of the Trustor in providing for Respondent as beneficiary. The Trustor, Michael Lee, was Respondent's father. She has a strong emotional attachment to the residence, and would like it maintained and preserved.

Respondent states she has requested information concerning the assets of the trust, but to date has received no specific or verifiable responses from the trustee about certain issues, including account balances at her father's death. Accounting information shows round numbers, but source documents have not been provided, and bank accounts seldom have round numbers. Respondent has requested information concerning personal property passing to her and her brother, and prepared a list of items known, but the trustee has failed to respond to her request for information.

SEE ADDITIONAL PAGES

Page 3

Respondent states her father had a truck that is not shown as an asset of the trust. Prior to his death, her father made statements that, "they took my car." No information has been provided regarding the vehicle.

Respondent states she was advised that at or about the time of his death, her father had placed \$40,000 in two envelopes, \$20,000 each, for each of his children. Respondent has requested information regarding those envelopes, but the trustee has failed to provide information, although the trustee has acknowledged that the envelopes existed. This money should be accounted for as trust asset.

Counsel for the trustee has twice provided accounting information about the trust. In fall of 2012, following the Trustor's death, information was provided regarding accounts and expenses incurred by the trustee (attached). In January 2014, an "informal accounting" provided additional documentation of transactions through the end of 2013. Total cash at that point was \$30,882.88. This petition indicates assets have decreased to \$18,000. The accounting is not prepared in the form prescribed by the Probate Code and failed to show the required information.

Accordingly, Respondent requests the trustee prepare an accounting in the form prescribed by law. Respondent also requests the Court review the appropriateness of the fees charged by the trustee (\$60/hour or \$5,185.20).

Petitioner requests reimbursement for costs. Respondent believes costs may be payable by the trust.

Respondent requests that:

- 1. The Court deny the petition for instructions in so far as it requests authority to list and/or sell the property and instruct the trustee to maintain and rent the residence at an appropriate rental;**
- 2. That the trustee be ordered to provide additional information concerning the trust assets and administration issues, together with additional information concerning the trust assets;**
- 3. That the trustee be ordered to file and serve on the beneficiary a revised accounting showing the assets on hand at date of death, remaining as of closing of the accounting, and to bring the account current through a date not less than 60 days prior to the rendering of the revised accounting;**
- 4. That the Court review the trustee's requested compensation;**
- 5. That the trustee's request for costs be denied; and**
- 6. For all other and proper orders.**

DOD: 5/29/12	LORI SHIBATA , Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 10/1/15:</u> Mr. Rube represents that a tentative settlement has been reached. Mr. Rube will be preparing a formal agreement and mutual release contingent upon Mr. Knudson's client inspecting the home. Note: On 7/9/15, the Court deferred its decision as to Ms. Lee's filing fees (for objections to both petitions) until it is determined if Ms. Lee is entitled to any compensation from the underlying action.
	Account period: 5/29/12 -12/31/14	
	Accounting: \$222,217.13	
	Beginning POH: \$217,835.61	
	Ending POH: \$153,215.26	
Cont from 041615, 052115, 070915, 091015, 100115	(\$13,215.26 cash plus residential real property valued at \$140,000.00)	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified	Trustee fee: \$3,870.00	
<input type="checkbox"/> Inventory	Petitioner has been paid \$5,185.20 for services through 12-31-13 and requests \$3,870.00 for services from 1/1/14 through 12/31/14.	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	Trustee reimbursement: \$428.94	
<input checked="" type="checkbox"/> Aff.Mail	Exhibit B-2 itemizes expenses including bills, travel, services. Receipts also attached.	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.	Petitioner states she has made disbursements for the maintenance of the residence owned by the trust and for the support and maintenance of Alyssa Lee and her minor daughter Ariana. Petitioner, upon taking over as trustee, determined that the real property owned by the trust was not in a condition to be rented to a third party. The cost to repair is approx. \$15,000.00. See inspection report attached. In addition, the sewer is in need of repair to make the real property habitable, which additional cost is \$1,200-\$1,400.	
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input checked="" type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202	Rent would likely be approx. \$950/month. With the cost of property taxes, insurance, manager, yard care, and general maintenance, and health insurance premiums, there would not be sufficient funds to provide for the support and maintenance of the beneficiary and her minor child. See breakdown. The decedent intended that income to the trust was to be used to provide for Alyssa Lee until she was 35. Decedent as trustor authorized the invasion of principal (i.e., the sale of the residence) to accomplish this goal. The primary goal was not to allow Alyssa to live in the house, but to provide income until she reached 35.	
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
SEE PAGE 2		Reviewed by: skc Reviewed on: 11/2/15 Updates: Recommendation: File 9B- Lee

Page 2

Petitioner states she has delivered all personal property to Alyssa Lee as requested, and is unaware of any other personal property referred to by Alyssa Lee. Petitioner has responded to requests for "missing property" on numerous occasions and has advised her that there is no other personal property and nothing has been removed from the home other than the items taken by Alyssa Lee and her mother and brother. Petitioner has responded to Alyssa Lee's inquiries re the truck on several occasions. See Exhibits D-1 and D-2 which show the transfer of the truck to the decedent's parents.

The decedent withdrew money from his checking account prior to his death and delivered the cash to his father. At the time, there was no written instruction as to the disposition of the cash. Therefore, upon his death, his father delivered the cash to Petitioner to deposit to the trust.

Petitioner prays for an order as follows:

- 1. Approving, allowing, and settling the First Account;**
- 2. Authorizing the trustee fees and reimbursement;**
- 3. For such other and further relief as the Court considers proper.**

Objections filed 5-7-15 by Alyssa Lee, Beneficiary, state the primary asset of the trust is the residence on Ellery in Fresno. From the time of her father's death, Alyssa has repeatedly requested that the house be retained for her eventual use and benefit, but the trustee has rejected those claims and assertions, even when provided information and an agreement by beneficiary and other family members to maintain the residence. Twice she has sought to sell the house by giving notice of proposed action; both times Alyssa has objected. Alyssa also objected to the Petition for Instructions, requesting additional information and an accounting. Alyssa now makes the following objections:

1. Trustee's Fees. The trustee's fees as reported and requested are excessive, both fees already paid, and fees for which approval is requested. Objector specifically references travel time, rate of approx. \$70.36/hr, and food purchases for two persons.
2. Attorney's Fees. While Objector acknowledges that the trustee is entitled to representation and advice in administration of the trust, there is no showing that the attorney's fees incurred were for the benefit of the trust and the beneficiary. Given the circumstances and the overall situation of the trust, it appears the trustee is incurring excessive attorney fees that are not in the best interest of the trust or its beneficiaries.

SEE ADDITIONAL PAGES

3. Trustee is not administering the trust in the best interest of the beneficiary and has refused to consider the beneficiary's requests, unilaterally interposing her own will in spite of requests by the beneficiary. Objector believes the Trustee has thwarted and attempted to destroy or remove any memories or links to her father. She was not advised of nor given the opportunity to attend the memorial service; she was not invited to go with the trustee and other family members on a chartered boat trip to dispose of his ashes. See accounting for documentation of funds spent on these events, including boat, luncheon for "Mike's family," limousine service, etc. Various items of jewelry that her father held for in the residence were not given to her, nor has the trustee been accommodating in seeking their return from family members who may have taken them. Prior to his death, Michael Lee was working on remodeling and refurbishing the house. There were various materials, including shelving, flooring, in the house. However, the trustee refused to proceed with any of the work and told Objector and/or Objector's mother that those items would be given away or thrown away. As the materials amounted to a substantial investment, the items were removed and are in storage at Objector's residence to be installed in the Ellery residence.

Objector and her mother also proposed the house be rented to a family member at \$850/month, with the family member to pay for water, garbage, lawn care, but in an email to Objector's mother Elizabeth Rocha-Lee, the trustee displayed a condescending and unyielding attitude. The trustee characterized the proposed rental as sub-par, even though this was an amount determined with reference to deductions for property management fees and other costs based on information provided by the trustee.

Alyssa also presented estimates for repair, which were discarded and discounted by the trustee. Now, after the trust has dissipated more than \$10,000 of available trust cash in carrying costs on the residence, payment of attorney's fees, and trustee's fees for trips back and forth to Fresno, Ms. Shibata now states the trust does not have the money to place the residence in rentable condition. At the time these proposals were made in 2013, there was and would have been sufficient cash to repair the residence with the assistance of the beneficiary and other family members who have an interest in preserving and maintaining it – an interest that the trustee does not share.

Accordingly, the trustee's actions with respect to the residence have not been in the beneficiary's interest, nor consistent with her wishes for preservation of the residence for her eventual long term use and enjoyment.

4. Trustee has been uncommunicative and uncooperative.
- a. In May 2012, the trustee opened an account for Alyssa's benefit, and deposited \$500 into it. However, when Alyssa withdrew the funds for her use, as provided by the terms of the trust, the trustee refused to deposit more funds and then closed the account.
 - b. The trustee persuaded to and did provide Kaiser medical insurance for the beneficiary; however, Alyssa does qualify for Medi-Cal and may determine that private medical insurance is no longer required. Alyssa has a young daughter, who, when born was also covered under Kaiser insurance, however, when that daughter was eligible for Medi-Cal, Alyssa requested that Kaiser for the child be cancelled. The trustee, however, misunderstood and sought to cancel Alyssa's medical insurance.

SEE ADDITIONAL PAGES

Page 4

- c. Other than paying the premiums on the medical insurance, the only benefit the trustee has provided to Alyssa was paying \$376.83 for a stroller, car seat and pay pen for the infant.
- d. The trustee has committed waste. In various communications, a shed was listed as being at the residence, but when the shed disappeared, she claimed she had no knowledge of it. Decedent was known to have had a number of tools, yet upon his death they could not be found. Alyssa believes Lori Shibata permitted other family members (Mike's siblings and parents) free access to the house.

Prior to his death, the decedent made statements to his wife and daughter that "they took my truck." When asked, Lori Shibata stated the truck had been given to his father or other family members. Now documentation appended to the account indicates the Toyota Tacoma was sold for \$1,000 to Raymond Yee, which Alyssa believes is far less than its fair market value.

Other instances of neglect and waste: the account shows the trustee had to address squatters in the residence. Objector previously advised the trustee that the locks were not working, but she did not replace them. Offers of assistance by Alyssa, her mother, and other family members to look after the residence or assist with its care have been rejected. As a result, it has not generated any income.

- e. The trustee has not satisfactorily explained the "missing \$40,000.00." See Objection for details.
5. Objector states the trust is ambiguous; it was not the decedent's intent that the residence be sold. Also, Article II claims no provision was made for Elizabeth D. Rocha Lee and/or Ramon Lee; however, Article 5a provides that personal effects, automobiles, and personal property are to be distributed to his children. The assets of the trust are to be retained with distributions to Alyssa one half at age 30 and the balance at age 35, however, the trust has generated less than \$100 of income during the last two years. The Trust is also ambiguous at Article V(g) which does not indicate any residual takers.

Accordingly, extrinsic evidence can and should be admitted to determine the trustor's intent in executing the trust document and what he meant to provide for his daughter Alyssa.

Objector requests that her objections be sustained, that the claimed charges be disallowed, that the trustee be surcharged for excessive and unnecessary trustee's fees and attorney's fees, that the request for approval of additional attorney's fees be denied, that the Court admit extrinsic evidence to construe the terms of the trust and the trustor's intent in providing for the beneficiary, that the trustee be instructed to provide additional information and seek additional information concerning the assets described herein, that the trustee be instructed to cooperate with the beneficiary to attempt to implement a plan by which the residence may be maintained to generate income for the beneficiary and ultimately for her use and benefit, and for all other and proper orders.

See also Declaration of Elizabeth Rocha-Lee in support of objections.

First and Final Account and Report of Administrator and Petition for Its Settlement, for
Allowance of Compensation to Administrator and Attorneys for Ordinary Services and for
Final Distribution

DOD: 1/12/15		<p>JAMES E. PRICE, Executor with Full IAEA without bond, is Petitioner.</p> <p>Account period: 1/13/15 – 9/25/15 Accounting: \$601,151.46 Beginning POH: \$593,734.31 Ending POH: \$597,864.64 (cash)</p> <p>Executor (Statutory): \$15,023.03</p> <p>Attorney (Statutory): \$15,023.03 (to be allocated \$7,511.52 to Dean Hiyama and \$7,511.51 to G.L. Motsenbocker, per agreement attached to Declaration)</p> <p>Closing: \$1,498.58</p> <p>Distribution pursuant to the decedent's will:</p> <ul style="list-style-type: none"> American Cancer Society: \$56,632.00 National Multiple Sclerosis Society: \$56,632.00 UCSF Alzheimer & Memory Center: \$113,264.00 Central California SPCA: \$56,632.00 Valerie All Price \$70,790.00 Virginia Doris Rhoan: \$70,790.00 Barbara Joan Brooks: \$70,790.00 De Anna Gail Hanson: \$70,790.00 	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input checked="" type="checkbox"/>	PTC			
<input checked="" type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			3/13/15
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input checked="" type="checkbox"/>	FTB Notice			

DOD: 11/17/12		JANIS G. HOWARD , Executor with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived	OFF CALENDAR Amended account filed 11/4/15 is set for hearing on 1/5/16.
Cont. from 93015		I&A: \$85,300.00	
	Aff.Sub.Wit.	POH: \$30,950.86 cash plus residential real property located on Clay Ave., in Fresno and misc. personal property	<p>1. The decedent's will divides the estate into four 25% shares as follows:</p> <ul style="list-style-type: none"> - 25% to Lary G. Deeing - 25% to Janis J. Howard - 25% to Verita V. Smith - 25% to Tammy Juarez, in trust, for the benefit of Jennifer Lynn Vest upon the terms and conditions set forth in Article Fifth. <p>Article Fifth then details how the trust shall be administered to provide for Jennifer's education, and states if she does not meet the various deadlines, then the assets of the trust shall be distributed to the other three heirs in equal shares.</p> <p>Petitioner alleges Jennifer has failed to meet the first requirement of the trust (that she failed to enroll in college before age 25), and requests that share be distributed from the estate to the other heirs (subject to various other agreements/assignments).</p> <p>However, it does not appear that <u>all</u> of the requirements have failed, and it does not appear this determination can be made from the estate.</p> <p><u>Please see discussion at Page 2.</u></p>
✓	Verified	Executor (Statutory): \$3,652.00	
✓	Inventory	Attorney (Statutory): \$3,652.00	
✓	PTC	Attorney (Extraordinary): \$2,255.00 (for 8.2 hours @ \$275/hr for legal services in connection with the sale of the real property and the negotiation of the mortgage payoff of the real property on hand)	
✓	Not.Cred.	Costs: \$1,412.30 (filing, publication, recording, appraisal)	
✓	Notice of Hrg	Petitioner states the personal property will be distributed pursuant to agreement without concern to the court.	
✓	Aff.Mail	Distribution pursuant to the terms of the decedent's will and assignments and agreements filed:	
	Aff.Pub.	Janis G. Howard: \$9,489.78 plus an undivided 50% interest in the real property	
	Sp.Ntc.	Verita Vernice Smith: \$9,489.78 plus an undivided 50% interest in the real property	
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		
			Reviewed by: skc Reviewed on: 11/2/15 Updates: 11/4/15 Recommendation: File 11 – Ingram

Page 2

NEEDS/PROBLEMS/COMMENTS Cont'd:

The will provides for distribution to Tammy Juarez as trustee of Jennifer's share, and at Article Fifth, provides for administration of the trust as follows:

- There shall be no distributions unless and until Jennifer enrolls in a post-high school program to further her education. The term "education shall include university, college, and postgraduate study at an institution or institutions of the beneficiary's choice
- When the beneficiary attains her four-year degree from a college or university, all remaining assets shall be distributed to her free of trust
- If the beneficiary fails to enroll in a college or university prior to attaining age 25; or
If the beneficiary fails to attain her four-year degree before she attains age 35; or
If the beneficiary disclaims this trust and its benefits; or
If the beneficiary otherwise fails to survive,
Then the assets shall be distributed to the other heirs.

Jennifer is currently 30 years old.

Petitioner alleges that she failed to enroll in a college or university prior to age 25 and therefore her share has lapsed and her trust should not be funded from the estate.

First, it appears that Jennifer still has five years to take advantage of her share.

Further, the will devises the share to the trust, and the trustee, Tammy Juarez, is then responsible for administering it according to the above terms, not Petitioner.

So it appears the 25% trust share should be included in the distribution regardless. Alternatively, the Court may require a signed disclaimer from Jennifer as set forth in the terms above and/or authority for distribution as prayed.

Note: This petition is based on a waiver of account from the two contemplated heirs. If the Court determines that the testamentary trust should be funded, additional waivers will be needed from Tammy Juarez and/or Jennifer Vest. Otherwise, a full account may be required.

Petition for Final Distribution Upon Waivers of Account and for Allowance of Compensation for Ordinary Services

DOD: 2/17/15		<p>ROBERT SHINTAKU, Brother and Administrator with Full IAEA without bond, is Petitioner.</p> <p>Accounting is waived.</p> <p>I&A: \$520,669.72 POH: \$420,813.78 (cash)</p> <p>Administrator (Statutory): \$13,511.39</p> <p>Attorney (Statutory): \$13,511.39</p> <p>Closing: \$2,000.00</p> <p>Distribution pursuant to intestate succession and Agreement Re Division of Personal Property:</p> <p>Eric Shintaku: \$79,947.75 (One-quarter of the cash plus one-quarter of the values of the vehicles less \$30,000 for the vehicle received)</p> <p>Kathleen Ishimoto: \$91,947.75 (One-quarter of the cash plus one-quarter of the values of the vehicles less \$18,000 for the vehicle received)</p> <p>Robert Shintaku: \$109,947.75 (One-quarter of the cash plus one-quarter of the values of the vehicles)</p> <p>Yulene Brasel: \$109,947.75 (One-quarter of the cash plus one-quarter of the values of the vehicles)</p>	NEEDS/PROBLEMS/COMMENTS:				
	Aff.Sub.Wit.						
✓	Verified						
✓	Inventory						
✓	PTC						
✓	Not.Cred.						
✓	Notice of Hrg						
✓	Aff.Mail			W			
	Aff.Pub.						
	Sp.Ntc.						
	Pers.Serv.						
	Conf. Screen						
✓	Letters						
	Duties/Supp						
	Objections						
	Video Receipt						
	CI Report						
✓	9202						
✓	Order						
	Aff. Posting						
	Status Rpt						
	UCCJEA						
	Citation						
✓	FTB Notice						
<table border="1"> <tr> <td>Reviewed by: skc</td> </tr> <tr> <td>Reviewed on: 11/2/15</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation: SUBMITTED</td> </tr> <tr> <td>File 12 – Shintaku</td> </tr> </table>			Reviewed by: skc	Reviewed on: 11/2/15	Updates:	Recommendation: SUBMITTED	File 12 – Shintaku
Reviewed by: skc							
Reviewed on: 11/2/15							
Updates:							
Recommendation: SUBMITTED							
File 12 – Shintaku							

See petition for details.			NEEDS/PROBLEMS/COMMENTS:
			<p><u>Note:</u> Petitioner also filed a Petition for Termination of Guardianship that is set for hearing on 11/30/15.</p> <p><u>Minute Order 9/17/15:</u> The Court orders that there shall be no visitation for either parent until they appear before the Court.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing at least 15 days prior to the hearing on: <ul style="list-style-type: none"> - Twila Mae Maldonado (Maternal Grandmother/ Guardian) - Alex Maldonado (Maternal Grandfather/ Guardian)
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg	x	
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 11/2/15
			Updates:
			Recommendation:
			File 13 – Maldonado

14 William Cooper & Richard Cooper (GUARD/P) Case No. 15CEPR00716

Guardian Cooper, Tammy (pro per – paternal aunt)

Mother Cayson, Shannon (pro per)

Probate Status Hearing Re: Visitation

Richard, 6	TAMMY COOPER , paternal aunt, was appointed Guardian of the Person on 09/24/15. At the hearing on 09/24/15, SHANNON CAYSON , mother, objected to the Petition. Minute order from 09/24/15 states: Ms. Cayson states her objections for the record and represents that her last use of meth was 5 months ago. The Court orders supervised visitation only for Ms. Cayson every Saturday from 12 noon to 2pm at the McDonald's at Shaw and Peach. Ms. Cooper shall remain in eyesight and hearing distance at all times. Parties are admonished to not discuss this matter or each other with the minors. The Minute Order also set this status hearing for status regarding the visitation.	NEEDS/PROBLEMS/COMMENTS: 1. Need status update regarding visitation.
William, 4		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: JF		
Reviewed on: 11/03/15		
Updates:		
Recommendation:		
File 14 - Cooper		

Probate Status Hearing RE: Proof of Bond

Age:		NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> Bond filed 10/6/15, Letters issued.
DOD:		
Cont. from		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	
Reviewed by: skc		
Reviewed on: 11/2/15		
Updates:		
Recommendation:		
File 15 – Flue		

DOD: 01/13/2015		KELLY HOOD , daughter/named alternate executor without bond, is petitioner. Full IAEA – o.k. Will dated: 08/02/2007 Residence: Fresno Publication: The Business Journal <u>Estimated value of the Estate:</u> Unknown Probate Referee – Rick Smith	NEEDS/PROBLEMS/COMMENTS: Minute Order of 10/01/2015: Examiner notes provided in open court. <u>Note:</u> If the petition is granted status hearings will be set as follows: • Thursday, 04/07/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 02/02/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
Cont. from 100115			
Aff.Sub.Wit.	s/p		
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	w/		
✓ Aff.Pub.			
Sp.Ntc.		Reviewed by: LV Reviewed on: 10/30/2015 Updates: 11/03/2015, 11/04/2015 Recommendation: Submitted File 16 – Pillor	
Pers.Serv.			
Conf. Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Petition to Determine Succession to Real Property (Prob. Code §13150)

DOD: 5/8/14		KELLI FRYE , Sister, and MARGARET PARSONS , Mother, are Petitioners. 40 days since DOD	NEEDS/PROBLEMS/COMMENTS: <u>Need amended petition. Issues include, but may not be limited to, the following:</u> 1. Pursuant to Probate Code §6402(b), if there is no surviving issue, the estate passes to the decedent's parent or parents equally. Siblings do not take unless both parents are deceased. Petitioner does not state whether the decedent's father is living or deceased. If deceased, need date of death per Local Rule 7.1.1.D. 2. Need completed I&A. The I&A attached to the petition has not been completed by the Probate Referee for valuation of the real and personal property pursuant to Probate Code §13151. <u>Note:</u> Petitioners include valuations of the personal property at Attachment 1; however, these items must be appraised by the Probate Referee. See Probate Code §§ 13152(b), 8900 et seq. 3. Attachment 11 does not state the decedent's interest in the real and personal property. 4. The same PO Box is listed as the address for all relatives at #14. For the amended petition, need clarification and notice to each person directly. CRC 7.51.
Cont. from 100615			
Aff.Sub.Wit.			
✓ Verified			
Inventory	x	No other proceedings I&A: <i>Incomplete</i> Decedent died intestate	
PTC			
Not.Cred.			
Notice of Hrg	x		
Aff.Mail	x	Petitioners state the decedent was survived by his mother, sister, and brother. The decedent's brother signed a Disclaimer of Interest.	
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen		Petitioners request Court determination that the decedent's real and personal property passes to them as joint tenants with right of survivorship.	
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Reviewed by: skc
Reviewed on: 11/2/15
Updates:
Recommendation:
File 17 – Carter

Petitioner Roman James Cota (Pro Per – Paternal Uncle – Petitioner)

Petitioner Carrie Joyce Cota (Pro Per – Paternal Aunt – Petitioner)

Petition for Appointment of Guardian of the Person

See petition for details.			NEEDS/PROBLEMS/COMMENTS:
			Minute Order 9/17/15: The Court orders that neither parent may have any visitation until they appear before the Court.
			1. Declaration filed 10/26/15 provides a printout of the hearing information provided to the mother via Facebook message on 10/3/15. Probate Code §1511 requires personal service.
	Aff.Sub.Wit.		<div>Reviewed by: skc</div> <div>Reviewed on: 11/2/15</div> <div>Updates:</div> <div>Recommendation:</div> <div>File 18 – Cota</div>
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
	Conf. Screen		
✓	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		

19 Jacquelyn Mae Everitt (CONS/PE)**Case No. 15CEPR00928**

Petitioner: Jerri Mae Toews (pro per)

Objector: Laura Abell (pro per)

Objector: Doreese Dee Loyd (pro per)

Petition for Appointment of Probate Conservator

		<p>There is no temporary. Temporary was denied.</p> <p>JERRI MAE TOEWS, daughter, is petitioner and requests the PUBLIC GUARDIAN be appointed as conservator.</p> <p>Please see petition for details.</p> <p>Court Investigator Report filed on 10/20/15</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Court Investigator Advised Rights on 10/6/15.</p> <ol style="list-style-type: none"> Petition is incomplete at #1. #1a. requests the Public Guardian be appointed as conservator of the person but #1b is blank as to conservator of the estate. It appears that petitioner is requesting appointment of the Public Guardian as conservator of the person and estate. Probate Code §1821 requires all relatives within the second degree to be listed. Petition lists proposed conservatee's two daughters. Does the proposed conservatee have, parents still living, grandchildren or siblings? If so, they all need to be listed at #11 of the petition and notified of the hearing. Need Notice of Hearing. Need proof of service of the Notice of Hearing along with a copy of the Petition on: <ol style="list-style-type: none"> Laura Abell (daughter) Doreese Dee Loyd (daughter) Public Guardian (proposed conservator) All other relatives within the 2nd degree. Need Citation <p>Please see additional page</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	X	
<input type="checkbox"/>	Conf. Screen	N/A	
<input type="checkbox"/>	Letters	X	
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt	N/A	
<input type="checkbox"/>	CI Report	X	
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation	X	
<input type="checkbox"/>	FTB Notice		

Reviewed by: KT
Reviewed on:
Updates:
Recommendation:
File 19 – Everitt

NEEDS/PROBLEMS/COMMENTS (Cont.):

6. Need proof of personal service of the Citation along with a copy of the Petition on Jacquelyn Everitt (proposed conservatee)
7. Order is incomplete (completely blank) Need new order.
8. Need Letters.

Note: If the petition is granted, status hearings will be set as follows:

- **Wednesday, March 30, 2016** at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal.
- **Wednesday, February 22, 2017** at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

20 Wallace L. Miller (Estate) Case No. 15CEPR00952

Attorney Willoughby, Hugh W (for Wallace D. Miller – Petitioner – Son)

Probate Petition for Letters of Administration with IAEA

DOD: 07/31/2015		WALLACE D. MILLER , son requests appointment as Administrator with bond set at \$171,000.00. Full IAEA – o.k. Decedent died intestate Residence: Fresno Publication: The Business Journal <u>Estimated value of the Estate:</u> Personal property - \$170,700.00 Probate Referee: Steven Diebert	NEEDS/PROBLEMS/COMMENTS:	
			<u>Note:</u> If the petition is granted status hearings will be set as follows: • Thursday, 12/03/2015 at 9:00a.m. in Dept. 303 for the filing of the Bond <u>and</u> Thursday, 04/07/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 02/02/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail		w/o	
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: LV	
			Reviewed on: 11/03/2015	
			Updates:	
			Recommendation: Submitted	
			File 20 – Miller	

DOD: 02/27/2014	CONNIE MEKEALIAN , niece is petitioner and requests appointment as Administrator with all funds to be placed in a blocked account.	NEEDS/PROBLEMS/COMMENTS: 1. Petition indicates decedent's residence at the time of death was Sanger, California, therefore the correct publication should be The Sanger Herald. Petitioner published in The Business Journal. 2. Petition requests full IAEA at #2c(1) of the petition, however the attachment to the petition states petitioner is requesting limited authority. Need clarification. 3. Need Notice of Petition to Administer Estate. 4. Need proof of service of the Notice of Petition to Administer Estate on the following pursuant to Probate Code §8110: <ul style="list-style-type: none"> • Roxann Mekealian (Spouse) • Charles Mekealian (son) • Randy Mekealian (son) • James Mekealian (son) • Greg Mekealian (brother) • Billy Tucker (Half-Brother) <u>Please see additional page for Status Hearings.</u>
Cont. from	Full IAEA – o.k.	
<input type="checkbox"/> Aff.Sub.Wit.	Decedent died intestate	
<input checked="" type="checkbox"/> Verified	Residence: Sanger Publication: The Business Journal	
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Estimated value of the Estate:	
<input type="checkbox"/> Notice of Hrg	Real property - \$100,000.00	
<input type="checkbox"/> Aff.Mail	Probate Referee: Rick Smith	
<input checked="" type="checkbox"/> Aff.Pub.	Attachment to Petition states Decedent was the owner of fractional interests in real property in Fresno County. Decedent had no personal property of which Petitioner is aware. Petitioner has only requested limited authority under the Independent Administration of Estates Act and will deposit all funds into a blocked account upon the sale of the same. Consequently, request is made that no bond be required.	
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: LV
		Reviewed on: 11/03/2015
		Updates:
		Recommendation:
		File 21 – Mekealian

Note: If the petition is granted status hearings will be set as follows:

- **Thursday, 12/03/2015 at 9:00a.m. in Dept. 303** for the filing of the Bond (if required) **and**

Thursday, 04/07/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal **and**

- **Thursday, 02/02/2017 at 9:00a.m. in Dept. 303** for the filing of the first account and final distribution.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.

22 Tadashi Okahata (Estate)**Case No. 15CEPR00957****Petitioner Vong, Tania C (Pro Per – Daughter)****Petition for Probate of Will and for Letters Testamentary. Authorization to Administer under IAEA**

DOD: 08/05/2015		TANIA VONG , daughter/alternate named executor without bond, is petitioner. Named Executor declines to act. Full IAEA – o.k. Will dated: 05/11/2011 Residence: Fresno Publication: The Business Journal <u>Estimated value of the Estate:</u> Personal property - \$3,500.00 Real property - \$200,000.00 Total - \$203,500.00	NEEDS/PROBLEMS/COMMENTS: Note: Final Inventory and Appraisal was filed 09/28/2015 therefore Examiner did not set a status hearing regarding the filing of the Inventory and Appraisal. Note: If the petition is granted status hearings will be set as follows: • Thursday, 02/02/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.	s/p		
<input type="checkbox"/> Verified			
<input checked="" type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input checked="" type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.		Reviewed by: LV Reviewed on: 11/03/2015 Updates: Recommendation: File 22 – Okahata	
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Court Investigator advised rights on 10/23/15</u> <u>Voting rights affected – need minute order.</u> Note: If granted, the order will be effective on Jessica's 18 th birthday. <ol style="list-style-type: none"> 1. Need Citation and proof of personal service of Citation with a copy of the petition at least 15 days prior to the hearing on Proposed Conservatee Jessica Estrada per Probate Code §1824. 2. Need Notice of Hearing and proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1822 on: <ul style="list-style-type: none"> - John Estrada (Father) - Megumi Fair (Mother) - Bernard Fair (Maternal Grandfather) - Emi Fair (Maternal Grandmother) - Felicia Neil (Sister) - Alexander Fair (Brother) 3. Although the petition is not marked at #5f, it appears Jessica may meet the definition re developmental disability set forth in Probate Code §1420, as her condition originated before age 18 and is expected to continue. Therefore, 30 days' Notice of Hearing with a copy of the petition is required to be served on CVRC pursuant to Probate Code §1820(e). 4. The petition is blank at #4b re whether the proposed Conservatee is receiving or entitled to receive benefits from the US Dept. of Veterans Affairs. If so, notice is required per Probate Code §1822(b). 5. Need video receipt per Local Rule 7.15.8.A. 6. Need Letters. 	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
	Letters			X
✓	Duties/Supp			
	Objections			
	Video Receipt			X
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 11/3/15	
			Updates:	
			Recommendation:	
			File 23 – Estrada	

DOD: 07/15/2015		JUDITH JANE ATKINS , step-daughter/named executor without bond, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Full IAEA – o.k.	Note: If the petition is granted status hearings will be set as follows:
Cont. from		Will dated: 02/13/2014	<ul style="list-style-type: none"> • Thursday, 04/07/2016 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Thursday, 02/02/2017 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution.
<input type="checkbox"/>	Aff.Sub.Wit. s/p		
<input checked="" type="checkbox"/>	Verified	Residence: Fresno Publication: The Business Journal	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Estimated value of the Estate:	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Personal property - \$24,630.93	
<input checked="" type="checkbox"/>	Aff.Mail w/	Real property - \$95,000.00	
<input checked="" type="checkbox"/>	Aff.Pub.	Total - \$119,630.93	
<input type="checkbox"/>	Sp.Ntc.	Probate Referee: Rick Smith	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	<p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>	
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA	Reviewed by: LV	
<input type="checkbox"/>	Citation	Reviewed on: 11/03/2015	
<input type="checkbox"/>	FTB Notice	Updates:	
		Recommendation: Submitted	
		File 24 – Rudolph	

Petitioner Whitmire, Paula Jean (Pro Per – Daughter – Petitioner)

Attorney Fanucchi, Edward L. (Court appointed attorney for Proposed Conservatee)

Petition for Appointment of Probate Conservator of the Person

Age: 88		TEMP NOT GRANTED, HEARING CONTINUED TO 12/2/15 See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. It does not appear that the Capacity Declaration was prepared by a physician or psychologist pursuant to Probate Code §§ 1890(c) and 2356.5(f)(3). The Probate Code states no court order for medical consent or dementia powers may be granted unless supported by a declaration executed by a licensed physician or psychologist within the scope of his or her licensure. 2. Petitioner did not attach the mandatory Attachment Requesting Special Orders Regarding Dementia to the petition which specifies the powers being sought, and therefore the request for such powers was not properly served on the proposed Conservatee or relatives. The Court may require amendment or may require the attachment to be filed separately and served on interested persons. <u>Examiner's Note:</u> This petition is for conservatorship of the person only. If conservatorship of the estate is to be considered, a separate petition and notice may be required.	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.	W		
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input checked="" type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input checked="" type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: skc				
Reviewed on: 11/3/15				
Updates:				
Recommendation:				
File 25 – Garoppo				

Petitioner Graciela Garcia (Pro Per)
 Petitioner Jorge Luis Garcia (Pro Per)

Petition for Appointment of Probate Conservator

		<p align="center">NO TEMPORARY REQUESTED</p> <p>GRACIELA GARCIA and JORGE LUIS GARCIA, parents, are Petitioners.</p> <p align="center">~Please see Petition for details~</p> <p>Court Investigator's Report was filed on 10/29/2015.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W/
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
✓	Citation			
	FTB Notice			
<p>Reviewed by: LEG</p> <p>Reviewed on: 11/3/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 26 – Diaz</p>				

Petitioner Leticia Rosa Gonzalez (Pro Per)

Petition to Appoint Temporary Guardian of the Person

			<u>General Hearing set for 1/6/2016</u>	NEEDS/PROBLEMS/COMMENTS:
			LETICIA ROSA GONZALEZ , non-relative, is Petitioner.	1. Need proof of five (5) court days' notice by personal service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian</i> , or <i>Consent to Appointment of Guardian and Waiver of Notice</i> , for:
Cont. from			~Please see Petition for details~	<ul style="list-style-type: none"> Jolene Mosqueda, mother, if Court does not find due diligence per Declaration filed 10/30/2015.
	Aff.Sub.Wit.			
✓	Verified			<p>Note: UCCJEA filed 10/22/2015 indicates the child is living with the mother.</p>
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W/		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
				Reviewed by: LEG
				Reviewed on: 11/3/15
				Updates:
				Recommendation:
				File 27 - Vara

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. Need clarification” Petitioner spelled the minor’s name as “Josiah,” but the TDM Summary Report spelled it “Joziah.” Family Court records also indicate “Joziah.” 2. Need Notice of Hearing. 3. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Reynaldo Reyes Rodriguez (Father) - Ashley Lecourt (Mother)
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg	X		
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	X		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 11/3/15	
			Updates:	
			Recommendation:	
			File 28 – Rodriguez	

Petitioner Robinson, Nicole Marie (Pro Per – Cousin – Petitioner)

Objector Palms, Shanikwa (Pro Per – Mother – Objector)

Petition for Appointment of Temporary Guardian of the Person (Prob. Code §2250)

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 10/29/15:</u> Continued for service as to Shanikwa Palms, Mother. 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the petition at least five court days prior to the hearing per Probate Code §2250(e) <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Shanikwa Palms (Mother) - Unknown Father 3. Petitioner's Confidential Guardian Screening Form is incomplete. Need additional information.	
Cont. from 102915				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			X
✓	Letters			
✓	Duties/Supp			
✓	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 11/2/15	
			Updates:	
			Recommendation:	
			File 29 - Potts	

Petitioner Santos Hernandez Panameno (Pro Per Petitioner)

Petitioner Ana Cecilia Rodas Ramos (Pro Per Petitioner)

Petition for Appointment of Temporary Guardian of the Person

		<u>General Hearing set for 12/3/2015</u>	NEEDS/PROBLEMS/COMMENTS:
		SANTOS HERNANDEZ PANAMENO , maternal uncle and aunt, ANA CECILIA RODAS RAMOS , are Petitioners.	Note: Petitioners are Spanish-speaking only.
		~Please see Petition for details~	<u>Continued from 10/29/2015.</u>
Cont. from 100115, 101515, 102915		Objection to Guardianship filed by MARIA HERNANDEZ, mother, on 10/14/2015.	Minute Order states Ms. Hernandez is again directed to provide the recordings to the Court Investigator forthwith. The Court Investigator reports that a referral to CPS was made, but they have closed the matter is unsubstantiated. The Court orders the Court Investigator to interview all parties, including the minor, and report back to the Court as to whether or not temporary orders should be made.
✓	Aff.Sub.Wit.	Proof of Service filed 10/29/2015 shows a copy of the Objection to Guardianship filed by MARIA HERNANDEZ, mother, on 10/14/2015, was personally served 10/15/15 to Petitioner Santos Panameno.	Note for background: Minute Order dated 10/15/2015 from the last hearing states Court interpreter interprets for Petitioners and mother. Petitioners are maternal uncle and aunt, not paternal. Ms. Hernandez is to turn over all recordings to the Fresno Superior Court Investigator. The Petitioners may contact the Court Investigator to listen to the recordings. The Court orders CPS to check the well-being of the child. Also, the Court orders that the father is not to be around the child for any reason.
✓	Verified	Court Investigator Samantha Henson's Supplemental Report was filed 11/14/2015.	Reviewed by: LEG
	Inventory		Reviewed on: 11/3/15
	PTC		Updates: 11/4/15
	Not.Cred.		Recommendation:
✓	Notice of Hrg		File 30 – Hernandez
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
✓	Objections	W/ POS	
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		